Assign a contact to a company s

Assign a Contact to a Company From a Contact Record

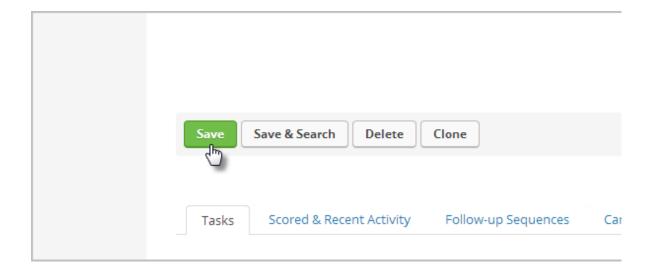
- 1. Open the contact record.
- 2. Click on **Search** to choose an existing company.

Last Name	
Company	
Company	Choose a company
Job Title	Go <u>Search</u> Clear
Person Type	Please select a person type
Lead Source	qg106.infusiontest.com

3. Click the **Select** link next to the company that the contact should be assigned to. (Using the search capabilities may make it easier to find the company. Type all or part of the company name and click Search.)

	7709	[Select]	Elit Pede LLC
	7813	[Select]	Montes Nascetur Ridiculus Limited
	7817	[Select]	Fermentum Metus Aenean Limited
	7821	[Select]	Mauris Corporation
	7825	[Select]	Dolor Corporation
	7829	[Select]	Et Nunc Quisque LLC
	7685	[Select]	Vehicula Corporation

4. Click on the **Save** button to apply the update.



Assign a Contact to a Company From a Company Record

1. Do a contact search from CRM > Contacts by entering the search criteria (company name, email address, etc.) for the contacts that should be assigned to a company.

Search	Search Criteria				
First Name	starts with	•]		
Last Name	starts with	•]		
Company	starts with	•]		
Email	ends with	▼ @infusionsoft]		
Temp	do not filter	T			
Tag Ids	With ANY of these T	•			

- 2. Review the list and mark the checkboxes for the contacts that should be assigned to the company.
- 3. Click on the Actions button and select Assign to Company.

Contacts 🗸	Companies 🐱	Opportunities 🗸	Referral Partner
🗶 Co	ntacts		
Actions Apply Actio	n Set	Falit Criteria/Columns	s Save P
Apply/Rem Assign to C Create Op	Company	<	1 2 3 4
	ferral Partner Referral	5	

4. Click on **Search** to choose an existing company.

Assign to Company
Your search returned 138 results . This action will assign all contacts to the company s
Choose a Company: Choose a company
Go <u>Search</u> Clear
Process Action Cancel and Return to Contacts
1.36.0.43 advContactSearch 60 n

5. Click on the **Process Action** button.

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(Process Action	C	ancel and Retu	rn to Contacts	
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